

## Agenda:

### TBL Scheduling Automation Forum

#### Two Identical Sessions

##### You must register to attend

October 19, 2004 from 10:00 a.m. to 12:00 p.m.  
Marriott City Center Hotel  
520 SW Broadway  
Portland, Oregon

October 20, 2004 from 1:00 p.m. to 3:00 p.m.  
Benson Hotel  
309 SW Broadway  
Portland, Oregon

TBL is offering two identical customer sessions in concert with Northwest Power Pool Schedulers Meeting on October 19 - 20, 2004.

These sessions will provide an overview of the changes that TBL is making to comply with Western Electricity Coordinating Council's (WECC) Reliability Management System (RMS) Agreement, and avoid sanctions that take effect in January 2005.

To register, send an email to [etags@bpa.gov](mailto:etags@bpa.gov). Provide your name, company, and the session you wish to attend.

#### Preschedule Overview of Change (30 minutes)

##### PreSchedule Affected Processes:

1. Require Both Tag and Schedule Submittals
2. Tags matched to accounts, Preschedule to deny tags if account can't be built
3. Use of 15 minute revision window
4. Use and meaning of pre-defined reasons for tag denial
5. Transition from Softsmith to OATI

##### PreSchedule Processes Not Affected by Automation Efforts:

1. Submittal time for Schedule, still in accordance with Reservation & Scheduling Business Practice
2. Submittal time for E-Tags with NERC
3. BPAT still requires the TCH request new accounts.
4. Hourly products still required phone request from TCH
5. Checkout to include checkout on tags (parallel operations). We are currently doing this under the new system. TCH Demand Usage and NFP/Direct Rights.

#### Real Time Overview of Change (30 minutes)

##### Real Time Affected Processes:

1. Require both E-Tag & schedule submittals
2. Real Time to deny tags if account not available
3. New automated scheduling path and contract validations
4. Tags will be actively processed 24-7
5. Tag suffixes to be used for Reserves, Losses, PF-Block & Station Service, Verification of proper use of E-Tag suffixes
6. E-Tag - schedule balancing
7. In-hour Curtailment Communication via the tag, not phone
8. Tags will be curtailed along with schedules
9. Interchange/Intrachange Scheduling procedural changes
10. E-Tag required before schedule in RT, RT 5 revision window
11. Checkout to include checkout on tags (parallel operations)

#### **Real Time Processes Not Affected by Automation Efforts**

1. All of the above mentioned changes are in addition to BPAT's current scheduling procedures and practices.
2. Tag submittal is not a request for transmission nor conformation of a schedule
3. Transmission purchases are still done via a phone call
4. TCH still needs to confirm the use of their rights
5. New schedules and schedule changes still need to be called in via phone

#### **After The Fact Overview of Change (30 minutes)**

##### **After The Fact Affected Processes:**

1. Parallel checkout
2. Tag and schedule matching and balancing TSI
3. ATF staff will follow WECC guidelines and new procedure regarding changes to schedules After-The-Fact
4. Enhanced views for E-Tag and schedule balancing

##### **After The Fact Processes Not Affected by Automation Efforts:**

1. Continued discrepancy resolution/reporting
2. ATF will continue to use CASSO as a source for resolving discrepancies
3. Billing will still pull from RODS as source data for billing purposes

#### **Cutover Strategy**

#### **Phase II Overview of Automation Efforts**